



# HIGHLIGHTS, FACTS & FIGURES 2021

Donau Soja



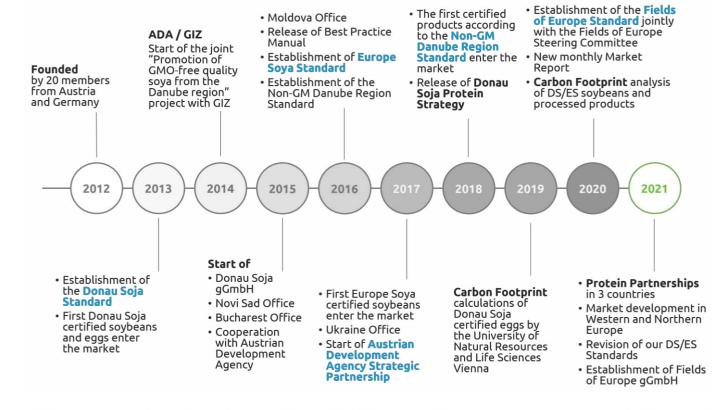
#### **ABOUT DONAU SOJA**

Donau Soja is an international, not-for-profit, multi-stakeholder, value-chain, membership-based organisation founded in 2012, promoting a non-GM, sustainable protein supply originating in Europe. It is based in Vienna, with regional offices in Serbia, Ukraine and Moldova.

Prominent European institutions and organisations support this ambitious initiative. Our 291 members include food retailers, large agricultural traders, animal feed producers, oil mills and numerous processors, as well as environmental organisations such as Greenpeace and the WWF. This broad membership base is essential to the Donau Soja mission. The initiative also enjoys broad support from the policy community: 15

European governments have supported the Donau Soja Declaration and 19 governments the Europe Soya Declaration. They recognise the need for added value in the Danube region, and the need to bolster an independent European supply of plant protein.

Our activities make a valuable contribution to ensuring food security and developing sustainable supply chains throughout the continent. Sustainability, non-GM farming and European origin are assured. Over the last years, we have succeeded in creating and successfully launching our own quality standards Donau Soja, Europe Soya and the Non-GM Danube Region Standard. The activities of Donau Soja are supported by the Austrian Development Agency (ADA).





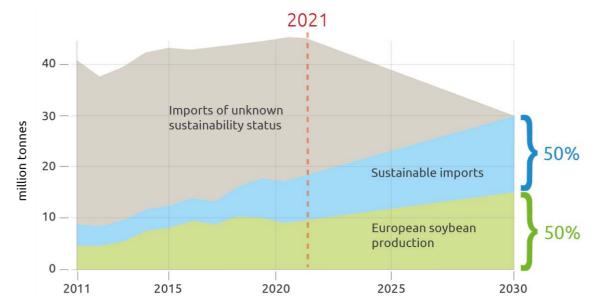
#### **OUR VISION**

#### A SUSTAINABLE AND SAFE EUROPEAN PROTEIN SUPPLY

The production of soybean has doubled in the last decade in Europe (the European Union and other European countries) and now stands at about 10 million tonnes. Despite this, Europe still has a substantial plant protein deficit that is met by the import of soybean and soybean meal equivalent to nearly 40 million tonnes of soybean.

For Donau Soja, the reduction of the European protein deficit met from sustainable sources is an important element of a sustainable agri-

food system. Reducing the overall demand for high-protein materials will reduce the total soybean requirement to 30 million tonnes. Half of this demand is met by further increases in production of soybean to 15 million tonnes of soybean. For the remaining import quantities, we envisage that environmental and social sustainability criteria in the exporting countries needs to be fulfilled. Certification schemes can therefore play an important role. We consider that the realisation of this vision as feasible by 2030.



Donau Soja Vision for a sustainable soybean consumption and sourcing in Europe.

#### **UNDERLYING ASSUMPTIONS**

Our agri-food system needs to change in several different ways to reduce Europe's dependency on imported soya. We regard these changes as ambitious, but realistic to accomplish:

**Firstly,** European soybean production needs to grow from today's 10 million tonnes by about 50% to 15 million tons.

**Secondly,** European soybean consumption needs to contract from about 45 million tonnes to 30 million tonnes soybean equivalents. This change will be substantial, but we see already today developments and megatrends which are contributing:

 increasing production of other grain legumes in Europe will substitute for soybean. This meets the growing demand for non-GM or organic

- products and can support regional/local valuechains:
- improved use of grasslands as an existing protein resource and development of new protein resources (e.g., algae culture);
- increasing efficiency in feeding protein through precision feeding and improved feeding strategies;
- 4. consumer change towards more plant-based protein diets.

Read more in our Donau Soja Protein Strategy for Europe: <a href="https://www.donausoja.org/en/about-us/news/ds-protein-strategy-for-europe/">www.donausoja.org/en/about-us/news/ds-protein-strategy-for-europe/</a>

#### **IN A NUTSHELL**

Organisation: International, not-for-profit, multi-

stakeholder, independent

Vision: Sustainable, safe & European

protein supply

Members: 291 **27** 

> members from countries

Goals: Support a

sustainable European soya production Establish local & safe supply chains

**Activities** Market Development

Agriculture

Research & Innovation
 Market analyses

Policy formation

- Certification
- B2B meetings
- Protein Partnerships an alternative to

credits from overseas

Offices



Vienna (Austria)



Novi Sad (Serbia)



Chişinău (Moldova)



Kyiv (Ukraine)

#### Donau Soja & Europe Soya

are leading standards for the European soya sector in terms of quality and quantity.



715,000 t certified soya beans



>10,000 soybean producers



almost 900 certified partners



34

primary processors (oil mills and small enterprises) with ES/DS/non-GM Danube Region Standard certification

non-GM **sustainable** 

controlled European origin

Additionally with volumes within the **Protein Partnership** programme, the potential volume of certified tons adds up



1,000,000 t



#### **OUR MEMBERS**

#### 291 Members from 27 countries united in joint vision



Kogelmann Robert | Geflügelhof Aigner KG | Höllerl's Freilandeier | Enengel Franz | Sandmayr Alfred | SC Agrotirnave SRL | Lambrecht Josef | WWF Deutschland | Mitterer GmbH | SC Transapicola | Saatbau Polska Sp.z.o.o. | Beinhundner Klaus | Astrid & Franz-Josef Telohe GbR | Bokelmann GbR | Agricultural Research & Development station Turda | Auf der Landwehr GmbH | Metz Rosmarie | MTÜ Eesti Sojaliit | Oriental Lotus Food Trade and Investment GmbH | Anzengruber Josef | Tatschl Produktions GmbH | Hölzl Franz | Vredeseilanden vzw (VECO Belgium) | Eierproduktion Mantler | Agrogonzalo 2014 S.L. | Brunner Helmut | Agro Luchky LLC | Livada Elisabeta | Mlynyshche LLC | Grim Management Services B.V. | Tauss GmbH | Bravo Agro Protein | CLI-Ins EURL | Lidl Stiftung | Bentia Dana | RAGT Saaten Österreich GmbH | Aldi South Group / Hofer KG | Landwirtschaft Eierhof-Krenn | Gauhs Ernst | Krumphuber Christian | terre-rhin-durable - Jörg Schaffer | SC Agrotirnave SRL | Ernst Pretzl

Update 1.4.2022

#### MEMBERSHIP BENEFITS



#### Shape the future of Donau Soja

As a member of our Association, you will be involved in the decision-making processes of the Donau Soja Association. You will elect Donau Soja bodies and have the right to vote at our General Assembly.



#### Get connected with key market players and strengthen your network

Donau Soja supports members to build influential connections and access potential partners and buyers. We facilitate specific requests and link members individually. Members receive access to exclusive B2B networking events.



#### Market updates: receive the latest news on non-GM soya market

Members receive Donau Soja market reports on the non-GM soya market and regular newsletters. Moreover, we facilitate market information exchange between members upon request.



#### Support in implementing our Standards

We support your every step in achieving compliance with Donau Soja's Standards. Members get free consultation on how to gain compliance with our widely acknowledged Standards (Donau Soja Standard, Europe Soya Standard and Non-GM Danube Region Standard), and how to use our trademarks.



#### Increase your brand visibility

Meet your potential business partners at congresses, exhibitions and fairs by sharing the booth with Donau Soja. You will gain visibility yet save time and money. Moreover, members benefit from a discount at our congresses and events.



#### Participation in demo fields and field days

Members can get involved in Donau Soja demonstration platforms (demo fields) at reduced fees and test, analyse and promote their products. Moreover, you will get a chance to become part of our research community and receive scientific research updates.



#### Showcase your carbon footprint reduction with Donau Soja

Together with us, you can showcase your carbon footprint reduction in your product resulting from the use of Donau Soja certified products. Recent studies carried out by an independent scientific institution show: Our Standards reduce the carbon footprint of pork and egg products by about 40%.



## Advocacy & Awareness: benefit from our strong support in advocating a sustainable and European protein supply

Take action and support discussions on the future of soya on the global and European markets. We work with governments and authorities to create a better regulatory environment at national and EU levels.

#### **AVAILABILITY OF CERTIFIED BEANS**

After harvest 2021, Donau Soja & Europe Soya certified partners from 11 different European countries reported a total of 715,000 tonnes of soybeans in their storages. Soybeans under the Donau Soja & Europe Standard fulfil rigid criteria and our partners are certified by accredited certification bodies. When sourcing Donau Soja

& Europe Soya certified soya, one can rest assured to buy high-quality, non-GM, traceable, deforestation-free and sustainable commodities from Europe, creating added create value for the region.

#### Certified volume in 2021





≈10%
of the total
non-GM soya
production
in Europe



Availability of Donau Soya & Europe Soya certified soybeans by storage location

#### A PROMISING FUTURE

In the upcoming years even larger quantities of certified soybeans can be made available: Up to 1,000,000 tonnes — thanks to Protein Partnership programmes and their supporters.

Protein Partnerships can be seen as the European alternative to credits from overseas.

By supporting local soya farmers in the main growing regions of South-Eastern Europe, retailers and major food brands make a valuable contribution to building up resilient supply chains from and for Europe.

#### A CRUCIAL PART OF THE VALUE CHAIN

Soybean processors certified under the Donau Soja & Europe Soya Standard are vital when it comes to the distribution of processed soya products. The number of businesses committed and sustainable traceable production, is constantly growing. These companies offer certified high-quality soya products for animal feed or for human consumption. Their products are ranging from soybean meal, soya protein concentrates, press cake, toasted soybeans to oil or lecithin.





#### Oil mills with ES/DS certification:

- 01. Sojaprotein, Becej (RS) DS
- 02. BAG, Güssing (AT) DS
- 03. Bioprotein, Obrenovac (RS) DS
- 04. Cereal Docks, Camisano (IT) ES+DS
- 05. Oleificio, San Giorgio (IT) ES
- 06. Sodrugestvo, Kaliningrad (RU) ES
- 07. Belagroterminal, Smorgon (BY) ES
- 08. Vandamme, Komárom (HU) DS
- 09. Nordic Soya Oy (FI) ES



#### Non-GM Danube Region Standard

- 10. Bimal, Brcko (BiH)
- 11. Mistral Komerc, Temerin (RS)
- DS = Donau Soja ES = Europe Soya



#### Other certified primary processors

#### Austria

Fuchshuber Agrarhandel GmbH Garant Tiernahrung GmbH Werk Pöchlarn Gsellmann Mischfuttererzeugung GmbH H. Lugitsch Partner - Biokorn GmbH Ing. Martin Stumpf, Die Hühnerei Innöl CoKG

MH Agrarhandel GmbH Mischfutterwerk Großschedl GmbH Mitterer GmbH

Seierl Landesprodukte GmbH Tatschl Produktions GmbH

Uitz - Mühle GesmbH

Unser Lagerhaus Warenhandels GmbH Witzmann Mühle GmbH

Lienhart Sojameal

Kraichgau Raiffeisen Zentrum eG

#### Romania

Agrotirnave S.R.L.

#### Serbia

Agrodjole d.o.o.

Animal Commerce d.o.o.

Vin Farm d.o.o.

#### Switzerland

Weinlandmühle Trüllikon Glanzmann AG

#### Tofu producers

#### Finland

Oy Soya Ab Jalofoods

#### Germany

ALFA BIO s.r.o. / LUNTER

Last update: September 2021

### NON-GM SOYA UPDATE

Our monthly market report 'Non-GM Soya Update' provides exclusive insights into the overall non-GM soybean market in Europe. The information is thoroughly researched and is sourced from our network of local experts and focal points.

We put special emphasis on:

- recent market developments
- production forecasts
- prices and premiums
- supply & demand estimates.

Contact for subscriptions: marketinfo@donausoja.org.







#### WHERE THE BEANS FLOW

From the soybean processing, the soya products end up in various branches. The lion share of Donau Soja & Europe Soya products ends up in feedstuff for livestock production such as for laying hens, poultry or pig, or in fish feed for Scandinavian aquaculture. A smaller, but steadily growing, share goes into the production of plant-based products such as tofu or vegan burgers.

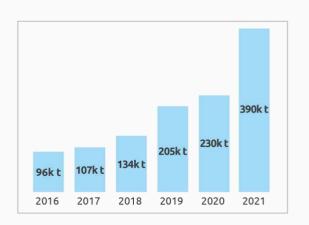
#### Retail chains offered certified and labelled DS & ES products in 2021

Eleven retail-chains offered in 2021 certified and labelled products of Donau Soja and Europe Soya. We have also additional users of our certified products. Animal-based products such as eggs "fed with Donau Soja & Europe Soya" end up on the tables of well-known quick service or full-service restaurants, for example. While soyabased products such as protein concentrates or texturised soy protein are sold as ingredients to food businesses that value sustainability and local sourcing.



#### Market uptake of DS/ES certified soybeans

The volume of certified beans that end up in final consumer products is steadily growing and reached a record of 390,000 tons in 2021. An increased demand for sustainable, European soy components for fish feed, contributed to a significant jump in market update compared to the year of 2020. While this is a positive and promising trend, there is still plenty of room for growth and we continue to support companies and even entire sectors all across Europe that decide to change to sustainable, certified soya from Europe.





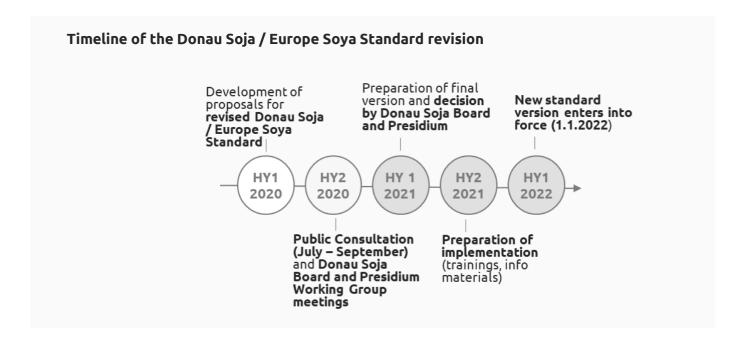
#### STANDARD REVISION DONAU SOJA / EUROPE SOYA STANDARD

In March 2020 Donau Soja started the revision process of the Donau Soja / Europe Soya Standard. In course of revising our Standards, Donau Soja

- defined 10 principles of Donau Soja / Europe Soya cultivation;
- defined 78 criteria for soya production within these principles based on existing requirements and EU legislation;
- created a glossary that goes along with the

- 10 Donau Soja/ Europe Soya principles and explains all relevant terms and definitions and
- improved the risk-based inspection system and introduced **3 new risk categories**.

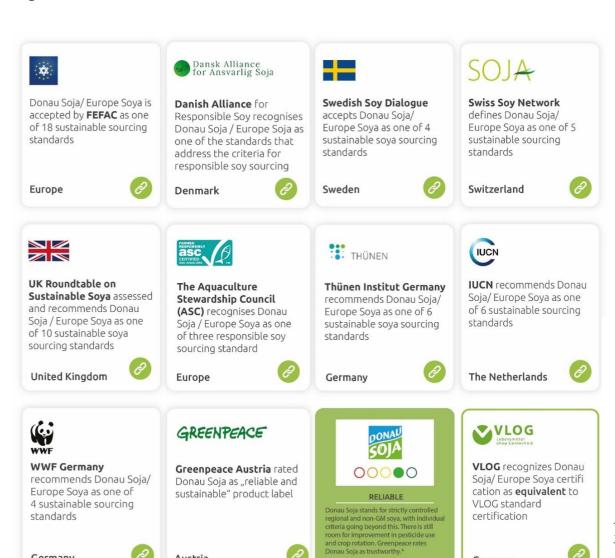
On 1 January 2022 the new version of the Donau Soja / Europe Soya standard enters into force. The Donau Soja team is developing supporting documentation for the implementation of the new requirements from 2022. Further webinars and trainings for certified partners are planned in 2022.





## SUSTAINABILITY BENCHMARKING OF **DONAU SOJA / EUROPE SOYA STANDARD**

Donau Soja and Europe Soya are recognised as sustainable standards by the following organisations:



Germany

12

Germany

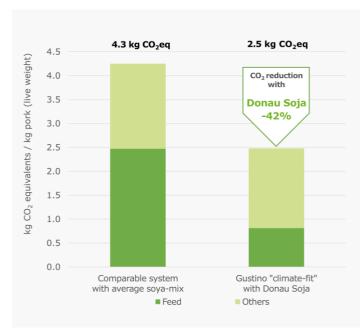
Austria

# DONAU SOJA / EUROPE SOYA: A CLIMATE FRIENDLY ALTERNATIVE

In the production of animal-based food, relevant amounts of greenhouse gas emissions already emerge during animal feed production.

Since March 2020, Donau Soja commissioned the Research Institute of Organic Agriculture (FiBL) Austria to investigate how using Donau Soja / Europe Soya-certified produces impact the carbon footprint of food and feed products.

The main result: the choice of feed determines the carbon footprint of livestock products. The use of Donau Soja / Europe Soya certified feed can reduce greenhouse gas emissions in livestock and feed products.



## Carbon footprint of *GUSTINO*-straw pig meat

**Partner**: Association of the Chamber of agriculture of Upper Austria (VLV)

**Data collection**: November 2020 – January 2021 at 14 GUSTINO-straw pig farms, Austria

**Results:** GUSTINO-straw pigs with Donau Sojacertified soya feed reduce CO<sub>2</sub> emissions by 42%. In total, the programme "climate-fit" avoids around 4,000 tonnes of CO<sub>2</sub> emissions per year.

**GUSTINO** 

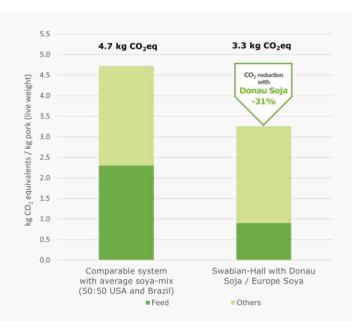
Strohschwein

## Carbon footprint of Swabian-Hall pig meat

**Partner**: Regional Farmers Association "Bäuerliche Erzeugergemeinschaft Schwäbisch Hall (BESH)"

**Data collection:** December 2020 – May 2021 at 32 Swabian Hall pig farms, Germany

**Results:** The use of Donau Soja / Europe Soyacertified soya feed reduces the carbon footprint of Swabian Hall pork by 31%.



#### Carbon footprint of Teichweiden eggs

Partner: Poultry farm Teichweiden

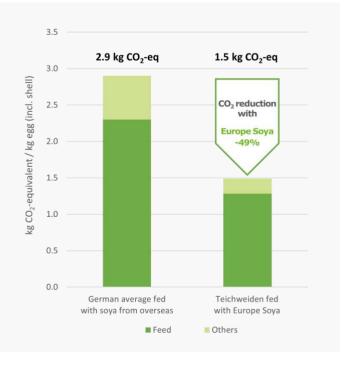
**Data collection**: September – November 2021 at

poultry farm Teichweiden, Germany

**Results:** Teichweiden eggs avoid 49% of CO<sub>2</sub> emissions compared to an average German egg production, due to a smart feed mix with Europe Soya certified soya feed and other regional legumes as well as other factors such as reduced barn emissions.

GEFL∳GELHOF

Teichweiden







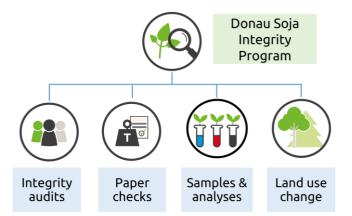


#### **QUALITY MANAGEMENT**

#### For ensuring compliance and improving quality within our certification system

The quality management team at the headquarters in Vienna as well as in Novi Sad, Kyiv and Chişinău offices are responsible for the quality assurance of the Donau Soja and Europe Soya Standards.

The team manages the approval processes of new certification bodies (CB), conducts annual training courses for the staff of certification bodies, support CBs in new certifications, provides translated documents to CBs and certified partners.



#### Analysis in the Donau Soja integrity program 2021 35 33 30 Number of analysis 15 17 4 12 10 GMO Pesticide Desiccation Desiccation Origin (PCR) residues (Glyphosate) (Diquat) (Isotope) higher values ■ non-conform

## Rigorous testing for compliance with our requirements

The Donau Soja integrity program ensures the compliance with our Donau Soja and Europe Soya Standard and the integrity of the entire system, including integrity audits at partners and certification bodies, witness audits and laboratory analysed of soya bean and soya products. In 2021, Donau Soja conducted in total 96 analyses of soybeans and soya produces. Thereof 34 for contaminations with GMO, 23 for general pesticide residues, 22 for desiccation (16 for Glyphosate residues and 6 for Diquat).

#### Our work in 2021 at a glance:

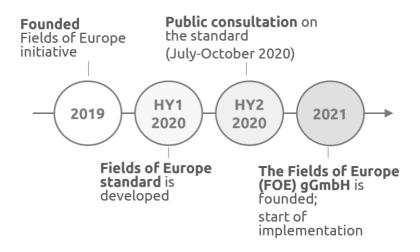


#### **FIELDS OF EUROPE:**

#### THE EUROPEAN FOOD AND FEED STANDARD

In 2019, a coalition of organisations and companies from the feed and food sector came together to develop a European food and feed standard, named Fields of Europe. The steering group consisting of the Royal Agrifirm Group, ADM, Ameropa, BFA, Donau Soja, Fenaco and Nevedi aimed to create a standard that meets

the demand for European products. The standard is being developed for companies in the feed and food supply chain that wish to produce and market feed or food products with non-GM ingredients from Europe which are produced in a sustainable way.



#### **JOIN US!**

The group of founding members take seat in the steering committee. New companies and organisations are very welcome to join the initiative and take place in the user group and ad-hoc working groups. Donau Soja hosts the Fields of Europe Secretariat.

## For more information about Fields of Europe:

Contact the project secretariat: info@fieldsofeurope.org.

Visit the Fields of Europe website: <a href="https://www.fieldsofeurope.org/">www.fieldsofeurope.org/</a>



The project to develop a European feed and food standard is supported by the Austrian Development Agency.



#### **PROTEIN PARTNERSHIPS**

#### A programme to increase sustainable non-GM soy cultivation in Europe for Europe

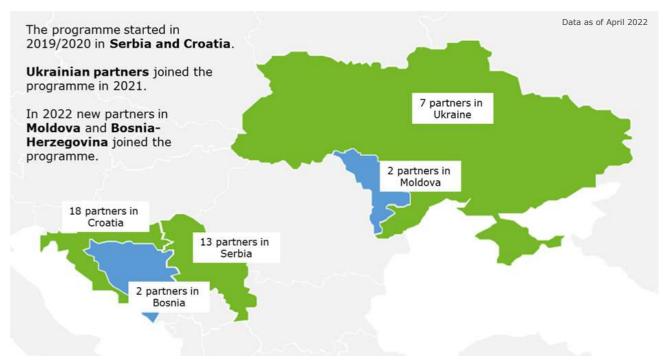
Donau Soja Protein Partnerships are a joint programme with the Austrian Development Agency (ADA) and primarily offered in non-EU countries. They are designed as an alternative to credits from overseas, to increase sustainable non-GM soya cultivation in Europe, for Europe.

Protein Partnerships are a simple tool for supporting and building up safe and sustainable non-GM soya supply chains in Europe, and at relatively low cost compared to physically segregated and certified products. They strengthen the first link in the physical value chain, as well as motivate to invest to train and certify farmers and primary collectors.

The partnership programme finances and organizes practical training for farmers and participation in field trials in partner countries. Knowledge transfer about best practice in soybean cultivation - from variety selection to crop protection - is done both theoretically and practically. A broad network of experts is available to farmers and cooperatives.

In 2020 REWE Group, LIDL Stiftung and BioMar had partnerships in Serbia and Croatia, in 2021 LIDL Stiftung enlarged its volume for the first time also into Ukraine. Whereas in Serbia thousands of small farmers are supported, Ukraine has the biggest potentials to increase sustainably produced volumes in Europe, for Europe.

Farmers and cooperatives participating in the partnership programme grow their soy according to the sustainability criteria of the Donau Soja/Europe Soya standards and can take advantage of free certification as part of the partnership - as can their first-collection points. This means that the first stage of the value chain is sustainably certified and traders as well as processors can access these European. sustainably produced non-GM soybeans. The more sustainably produced beans are available, the lower the cost of segregated flows, the easier it is to build physical supply chains from field to plate. A win-win situation for all involved.



The Protein Partnership programme is supported by the Austrian Development Agency.

#### MORE SUSTAINABLE CULTIVATION AND USE

A major part of Donau Soja's efforts to develop sustainable European and is to disseminate best practices in soybean cropping. Donau Soja provides educational resources (handbooks and videos) and organises events online and in the field to better connect farmers, scientists, and input providers.

Due to Covid-induced restrictions, we strengthened in 2021 our online services and produced videos and organised several online meetings.

Since fall 2021, advanced soybean analytics can be ordered via Donau Soja. Based on the latest NIR products of the German feed specialist Evonik, agricultural raw materials and processed soybean products can be analysed on their nutrient profile and on processing indicators (e.g., protein solubility, trypsin-inhibitor-activity). These services are recommended for producers of soya cakes to optimise their processing efficiency.

Obtaining latest insights and data for soybean cultivation and sharing those with the local and international agricultural community is an important for the work of Donau Soja. Exemplary activities are the Soya Discussion Club in Ukraine as well as the Ukrainian Crop Tour in 2021.





Various online events in the Donau Soja target countries were organised to facilitate local networks and knowledge exchange.



The DevRAM project provided with EU funding a seed driller to the Institute Selectia (Bălţi, Moldova). Project coordinator Viorel Gherciu hands over the equipment in 2021.



#### COMMUNICATION FOR CHANGE

Due to the Corona pandemic, 2021 was a difficult year in communicating our Donau Soja messages and organise live events. Nevertheless, we made it to set up many events, both online and offline.

One of our most successful campaigns with a high media coverage and 240,000 people reached on social media were our activities in Scandinavia. Donau Soja, used in Scandinavian fish feed, can significantly reduce  $CO_2$  emissions.

Besides, we presented the results of our  $CO_2$  calculations with other partners and members at several press conferences, congresses (such as the EuroTier) and webinars throughout the year in Austria and Germany and to many other participants from numerous countries. During a summer visit of young agronomists from the Ukraine in Austria, several interesting spots were shown to our guests and media articles were published.

Donau Soja organised a big event in Moldova, closing our EU funded project DevRAM Part I – to increase the competitiveness of the agri-food sector through integration to domestic and global value chains in Moldova. The closing event took place with Donau Soja experts, Moldovan Ministries, the Austrian Development Agency (ADA) and the Pro Didactica Educational Centre.

In 2022 Donau Soja celebrates it's 10 years anniversary with numerous activities. On 29/30 September there will be a 2-days anniversary event in Vienna with a conference, networking and an exhibition. If you are interested to participate or contribute go to <a href="https://www.10yearsdonausoja.com">www.10yearsdonausoja.com</a>.











Donau Soja communication efforts in 2021 in online media, at press events and in networking events such as the Danube Exchange

## Communication in numbers



**44** Press releases

4 Press conferences

**232** Media articles

in Austria, Canada, Germany, Italy, Moldova, Netherlands, Norway, Serbia, Switzerland, Ukraine, United Kingdom

**12,159** Social Media followers in Facebook and Linkedin

#### **LEGUME HUB - EUROPE'S KNOWLEDGE PLATFORM FOR LEGUMES**

The Legume Hub (legumehub.eu) was developed within the Legumes Translated project by Donau Soja and was launched in summer 2021. The Legume Hub aims to empower all interested in the development of legume cropping and use with access to knowledge, insight and successful practices across value chains - from plant breeding, on-farm activities, to processing and consumption.

The Legume Hub is collectively owned by the

members of the European Legume Hub Community (established as the European Legume Hub Association). All users involved in the development of legume production and use are invited to join the Legume Hub Community by registering as a member.

Donau Soja provides the secretariat for the Legume Hub.

#### The Legume Hub is an

- · open accessible;
- self-publishing; and
- multi-lingual knowledge platform: English, German, Romanian and Russian.

#### Open and free to join

- Publish your articles, research reports or videos or
- disseminate existing ones
- Each is citable as a scientific or technical publication.

## The Legume Hub gives maximum recognition to

- its contributors;
- their projects;
- and various organisations.





#### FOLLOW US: @LegumeHubEU













Donau Soja is supported by the Austrian Development Agency (ADA) in framework of the Strategic Partnership Project «Building sustainable, inclusive and well-functioning value chains for non-GM soya and organic soya in Serbia, Bosnia and Herzegovina, Moldova and Ukraine» funded by ADA over a period of 7 years (2017-2023).



#### **DONAU SOJA**

Promoting a sustainable and European protein supply

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